STRATEGIC MARKETING PLAN FOR

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Tourism

IN ALBERTA

1991 — 1996

Alberta
TOURISM

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Preface

To be successful in a tight and competitive market such as tourism, it is not enough to have a good product to sell, or even to advertise it widely. Success depends on knowing who one's potential customers are, determining business goals based on that potential market, and then designing strategies for reaching those goals. That preliminary work is what is meant by "marketing," and it should always be the basis for deciding how to advertise, promote, and increase sales.

Successful marketing in an industry such as tourism is a bigger job than most tourism operators could hope to accomplish on their own, and all operators benefit as the industry grows and attracts more business. Therefore, it is to everyone's advantage to pool their ideas and their abilities, working together on marketing strategies that will help each operator strengthen their own tourism business.

The ***Strategic Marketing Plan for Tourism in Alberta*** was developed for that purpose. It provides a framework that Alberta's tourism partners can use, both individually and in collaboration with others, in planning marketing strategies over the next five years. The plan outlines the kinds of roles to be taken by various tourism partners, as well as suggestions for cooperation among those partners.

This strategic marketing plan sets five-year objectives for the growth of tourism in Alberta. These objectives are major targets for the industry to move toward—much like one's destination in driving a car—and they are not expected to change. This plan does not detail marketing activities. However, the specific marketing activities used to reach those objectives by each of Alberta's tourism partners must be periodically reviewed and adjusted—just as a driver makes continual adjustments to keep a car on course, checking signs and maps to choose the best route and to measure progress. Therefore, this plan includes a regular review process: Alberta's tourism players will be encouraged to meet every year to review their marketing plans and develop annual activity plans, making sure the industry is proceeding on course toward achieving its objectives.

The ***Strategic Marketing Plan for Tourism in Alberta*** was prepared in cooperation with a Task Force made up of tourism operators in the private sector, representatives of regional and local tourism facilities and associations, and representatives of provincial and federal tourism departments. Thus, the Task Force has already started to make tourism marketing a cooperative process in Alberta. Members of the Task Force invite all other tourism players to join in that partnership, and hope that this Strategic Plan will help to focus the intellect, the energy, and the activity of Alberta's tourism partners in creating a truly collaborative future for tourism.

Rationale for the Marketing Plan

Market Sources

Tourism is Alberta's third largest industry. Estimates prepared by Alberta Tourism for 1990 suggest that travel to and within Alberta generated $2.6 billion as 13.3 million individuals spent one or more nights in the province.

Considering indirect revenues as well, the industry's economic impact is even greater. In 1989 tourism directly employed some 90,600 people—62,500 of them directly and another 28,100 indirectly. That same year, the economic impact on Alberta (including indirect revenues, the creation of jobs, and so on) reached $4 billion. In the same year, the industry was responsible for $801 million in capital investment and generated $463 million in provincial and municipal revenues.

Tourism in Alberta has grown in the past decade, primarily because of increased numbers of international travellers. Between 1982 and 1991, average annual growth rates of travellers staying one or more nights from various areas were:

- Albertans 1.5% per year
- Other Canadians 5% per year
- USA -1.4% per year
- Overseas 8.6% per year
- Total 1.2% per year

Thus, the number of travellers staying one or more nights in Alberta grew by approximately 10 per cent in the last ten years. During the same period, receipts from travel in the province increased by about 17 per cent.

The number of overseas travellers visiting Alberta is not expected to grow at this high a rate over the next five years. Continued industry growth therefore will depend not only on attracting a higher proportion of the travelling public to Alberta, but also on encouraging them to stay longer and spend more of their travelling dollars here. Marketing efforts must be carefully focused on Alberta's most promising opportunities.

Global Competition

Worldwide, the number of attractive travel destinations grew immensely in the past decade. Competition exploded and it became much more expensive for new players to break into the market. Collective marketing and promotional organizations put more money into attracting specific segments of the travel market.

Albertans must similarly pool their energies and their marketing efforts in order to succeed in this competitive tourism environment.

Alberta's Tourism Marketing Team

To succeed in the competitive global environment, Albertans in the tourism industry must agree to work together as members of a tourism marketing team. All players must understand how their role contributes to overall success, and must carry out that role in cooperation with others. Leadership on the team must change as the demands of the market change. The national tourism organization (NTO), the provincial marketing organization (PMO), destination marketing organizations (DMO), and private sector suppliers (PSS) must each be involved in a leadership role when and where they will have the greatest impact.

Marketing Funds

Funding for marketing initiatives in tourism will be limited in the foreseeable future for everyone in the industry. Tourism partners therefore must work collectively to achieve the best return for each marketing dollar spent.

The Tourism Marketing Team

Team Players

Exhibit 1 illustrates the major roles of key players on the Tourism Marketing Team. Each member of the team is a critical player and, at certain times in the marketing cycle, may take the leadership role.

Roles of the Team Players

In order to win, the team must learn to pass the puck. The bottom half of Exhibit 1 illustrates how the leadership role is passed from the national tourism organization (NTO), to the provincial marketing organization (PMO), to destination marketing organizations (DMO), and on to private sector suppliers (PSS) as the market needs change.

National Tourism Organization (NTO)

The national tourism organization (NTO) in Canada is Tourism Canada.

The NTO is responsible for creating awareness of Canada as a tourist destination in markets at a long distance from Alberta (called "long-haul markets"), both those that are already developing and those that are expected to emerge in the future. The NTO will take a leading role in the following areas:

- researching and screening target markets, and matching different tourism products (destinations, facilities, services, and so on) to various segments of the target market
- building awareness of and an image of Canada in long-haul markets
- creating a desire to travel to Canada in key market segments in long-haul markets
- supporting other industry players by coordinating joint marketing efforts, by encouraging world-class product development, and by providing supportive market research and evaluation.

Provincial Marketing Organization (PMO)

The primary focus of the PMO (Alberta Tourism) is to create a positive awareness of Alberta as a travel destination and generate a desire to travel here. The product development branches within Alberta Tourism try to ensure that the products and services demanded by the market are available in the quantities required, at the time required, and at a standard that will satisfy the consumer.

The best way to unite the development, marketing and servicing aspects of an organization is to create a strategy that is based on consensus among the team members and sensitive to the market.

The lead role of the PMO is to:

- position the province—that is, create a certain kind of perception of the province—in alignment with the type of experience that the potential visitor desires
- identify and target new markets and/or market segments
- begin the marketing cycle in new markets
- act as a leading partner in growth markets
- undertake activities that are not practical for DMO and PSS partners
- help other players sustain markets that are already developed
- be ready to take advantage of opportunity marketing.

Destination Marketing Organization (DMO)

There are at least three kinds of DMO's, all of them working to develop awareness of the variety and value of places to visit in Alberta. These organizations may be geographically-based marketing entities, such as convention bureaus, visitor bureaus, and zone organizations. Some are organized to target specific vertical markets, such as people interested in skiing, guest ranches, and so on. Others are private sector organizations, which may focus on either geographic or sectoral marketing.

The role of the DMO is to:

- participate in marketing activities in growing markets and/or market segments
- take the lead role in attracting vertical markets and in sustaining geographic markets
- support the activities of the PMO in developing new markets
- be ready to take advantage of opportunity marketing.

Private Sector Suppliers (PSS)

These organizations supply the tangible goods and services required by the tourism industry and therefore are responsible for a good portion of the "travel experience" sought by the customer. Private sector suppliers are not limited to operators resident in Alberta. A critical part of the tourism team are those travel influencers—the tour operators, wholesalers, travel agents, auto clubs, etc.—who operate outside Alberta and help convince people to travel here.

The role of the PSS is to:

- provide product and service excellence
- provide marketing in regard to the final point of sale
- participate with DMOs in developing and sustaining markets
- participate in consortium activity where appropriate
- take a leading role, with the DMOs, in organizing and collectively marketing with the Alberta travel client.

The Tourism Marketing Team

The upper portion of Exhibit 1 shows the basic elements of the consumer's visit to an area: awareness of a destination, a decision to travel to that destination, actual purchase, the experience itself, and then the follow-up—that is, a memory (positive or negative), a recommendation (positive or negative), and a decision whether or not to repeat the experience.

The lower portion of Exhibit 1 shows the relative importance of each of the tourism team players at various stages in the consumer's decision-making processes.

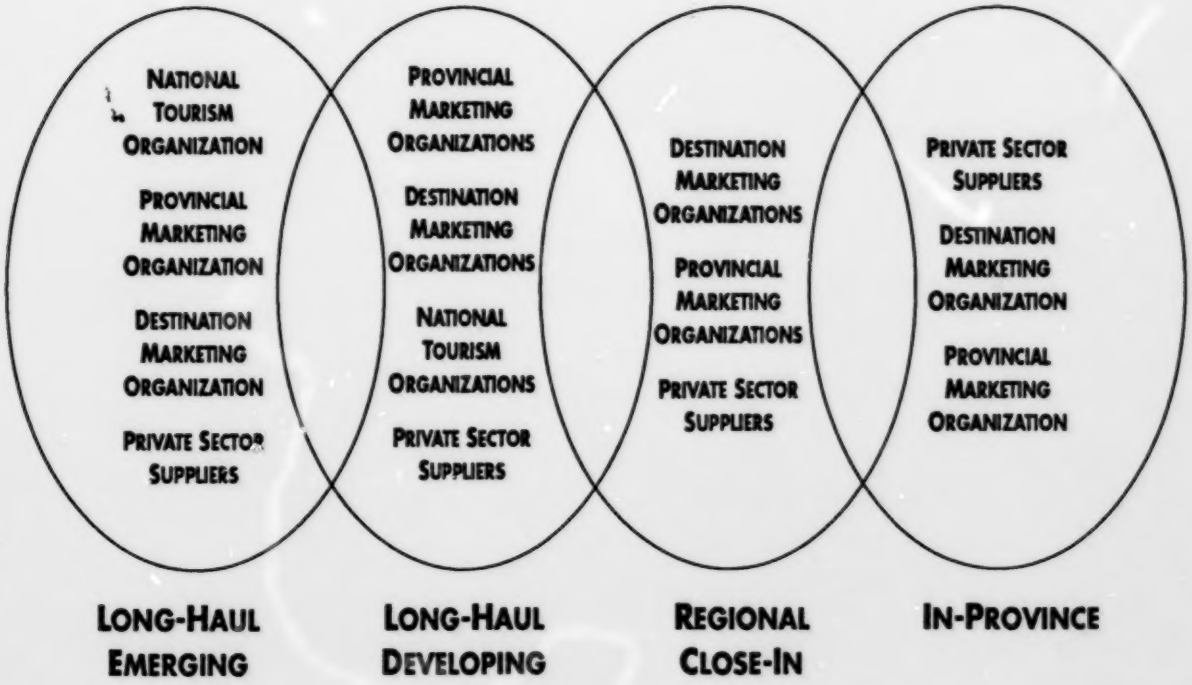
The roles of the key players are critically interwoven. In order to succeed, the tourism marketing team will need continual and excellent communication, shared values, a common vision, and a common understanding of the goals.

Alberta's tourism players must develop consensus around a vision of the industry's future, and they must share the short-term goals and objectives dictated by that vision. They must understand the roles and responsibilities of each player, and they must learn to play as a team.

The marketing plan presented in this document is built around the various players on the Alberta Tourism Marketing Team, and will refer to their roles and responsibilities in the marketing game.

Exhibit 1
Stages In The Tourism Marketing Cycle

Roles Of Key Players On The Marketing Team



Note: *Circles reflect areas of influence during the tourism/marketing purchase cycle. In each circle, each player has either a dominant/lead or secondary, supportive role.*

Source: *Tourism Marketing Planning Framework and Process*

Current Source of 1+ Night Visitors To and Within Alberta 1990, All Markets

	TOTAL PERSON-VISITS (1+ NIGHTS)	AV. SIZE OF TRAVEL PARTY	AV. # OF NIGHTS IN ALBERTA	AVERAGE EXPENDITURE PER TRIP	TOTAL EXPENDITURE (IN MILLIONS OF DOLLARS)
In Province	9,605,700	134	1290.0		
Regional Close In					
B.C.	1,030,200	1.9	5.0	270	278.60
Sask	692,500	2.3	4.4	188	130.30
Montana	69,000	2.7	2.6	245	16.90
Washington/Oregon	112,600	2.3	4.5	274	30.90
SUB-TOTAL	1,904,300	2.1	4.7	240	456.70
LONG HAUL DEVELOPING					
PRIMARY					
Ontario	314,000	1.6	6.7	486	152.50
California	142,500	2.0	5.4	465	66.20
SW & WS Central	123,500	2.0	5.4	322	39.80
NE Seaboard	87,300	2.0	5.5	622	54.40
SE Seaboard	70,200	2.0	4.5	469	32.90
East Central & WN Central	167,400	2.1	4.7	355	59.50
Japan	90,000	2.5	4.6	589	53.00
United Kingdom	102,600	1.9	9.9	752	77.20
West Germany	46,900	2.1	9.2	597	28.00
Australia/New Zealand	52,800	2.0	9.5	521	27.50
SECONDARY					
Other Canada	343,200	1.8	7.1	434	149.00
Other United States	57,200	2.4	3.9	236	13.50
SUB-TOTAL	1,597,600	1.9	6.4	472	753.50
LONG HAUL EMERGING					
France	6,800	2.1	7.6	441	3.00
The Netherlands	14,000	1.9	14.6	529	7.40
Switzerland	18,300	2.2	11.5	617	11.30
Hong Kong	13,200	1.9	11.4	477	6.3
Taiwan	900	1.0	2.1	178	0.16
South Korea	800	1.0	5.0	488	0.39
Other International	85,200	2.0	15.2	640	54.50
SUB-TOTAL	139,200	2.0	13.7	597	83.10
TOTAL (Excluding In-Province)	3,641,100	2.0	5.8	355	1,293.30

Situation Assessment

Existing Markets

The Table on the opposite page illustrates the four existing markets available to Alberta:

- ***In-Province Markets***, that is, travellers who account for 73 per cent of overnight travel and 50 per cent of tourism revenue
- ***Regional "Close-In" Markets***, which account for 14.4 per cent of the overall market, generate 1.9 million person-trips (that is, individuals spending at least one night) and account for almost $0.5 billion in annual revenue
- ***Long-Haul Developing Markets*** (already aware of Alberta and travelling here to some extent), which account for 12 per cent of the province's travel and almost 30 per cent of revenue
- ***Long-Haul Emerging Markets*** (where there is little awareness of Alberta as a destination), which account for 1 per cent of visitation but 3 per cent of revenue through tourism in Alberta.

Persuadable Markets

"Persuadable markets" refers to those people who can be persuaded, through marketing activities, to select Alberta as a travel destination. People from long haul markets travel for reasons unrelated to the attractiveness of an area. Their trips may be dictated by the location of a business client or a conference, or by where a particular friend or family member lives. There is little point in trying to attract these people to Alberta, because their travel decisions are heavily influenced by outside factors.

The persuadable component of the in-province and regional markets does include trips to visit friends or relatives, as well-planned marketing efforts can often influence them to stay longer or to spend more money on specific activities or attractions.

The persuadable component of Alberta's overnight markets amounts to approximately 45 per cent of all travellers.

In the long-haul developing markets, about 54 per cent, or about 879 thousand visitors per year, are considered to be persuadable. It is important that marketing strategies remain focused on the persuadable market—the market from which we are most likely to obtain a return on our investment.

The Trip Occasion

Why do people choose to travel to Alberta over some place else? Can they be persuaded to stay longer, to return

another time, or to spend more while they are here?

Visitors purchase a "travel experience," which is often part of an *occasion* that takes place at a specific place and time. Thus, the occasion may be as important as visitor characteristics in triggering a desire for the travel experience. The same person may want to come for Alberta's heritage attractions in the fall and for a ski experience in the winter. The marketing cycle, and the research it is based on, must consider the *trip occasion* when addressing the persuadable market.

Product/Market Match

Three separate sets of analysis were undertaken in order to build in the criteria necessary to preserve Alberta's major tourism assets for the long term:

- Market segment strength analysis - Each of the occasion based markets (with the exception of meetings) was examined in terms of its strength in each of 11 geographic markets.
- Analysis of competitive environment - An analysis of the experience desired by each segment was rated against the availability of that experience in each of 11 geographic markets. Price, accessibility, image, and marketing approaches were compared.
- Analyses of markets against the decision criteria that were established as assumptions relating to goals and objectives: maximum yield, seasonal spread, geographic spread, environmental compatibility, and support Alberta's culture.

Strategic Focus

The Strategic Marketing Plan for Tourism in Alberta emphasizes the "Long haul developing" components of the market.

There are a number of reasons for this focus:

- In-Alberta markets are already well-addressed by private sector suppliers (PSS) and destination marketing organizations (DMOs).
- Regional close-in markets already are aware of Alberta and have demonstrated interest. Plans to address these markets are in place through the DMOs.
- The long-haul developing market has been Alberta's primary growth market in the past decade; it offers the greatest future potential to offer Alberta an increased market size, an increased share of that market, and increased net yield.
- Alberta Tourism and its partners (NTO, DMO, PSS) will attempt to generate the **maximum net yield** from tourism. More specifically:
- Emphasis will be given to those markets that generate the greatest return for a given amount of marketing effort; this will be the most important criterion during this planning period.
- There will be an effort to cultivate a market mix, in order to support **greater use of existing capacities on a four-season, year-round basis**; this will be the second most important criterion during this planning period.
- Maximizing Alberta tourism's net yield is most likely to happen by **focusing on the persuadable component** of occasion-based segments within the long-haul developing markets.

Strategic Assumptions

This marketing plan is intended to cover a five-year period, ending in 1996. The plan rests on a number of assumptions:

- The economies of the major target markets—Ontario, the USA, Europe and Japan—will grow slowly during the period covered by the plan.
- No major political shock (such as a war) is expected to occur during this period.
- The current trend toward the short "getaway" trip will continue, but the number of longer trips (5 or more days) will also increase.
- Markets generally will increase in sophistication, demand more information, and choose their travel experiences more carefully.
- Competition will remain very intense.
- The Bow-Canmore region will be further developed within the next five years, and minor attractions will be developed in all regions.
- Destination marketing organizations and their tourism marketing regions will become increasingly sophisticated.
- Rapid technological change in tourism systems will occur, and Alberta will adopt this technology as soon as it is reasonable to do so.
- Flight accessibility will remain a major constraint; the cost of airfare in and to Canada will remain relatively high, and fuel prices will remain a stable part of that overall cost.
- The concept of tourism marketing to regional close-in markets, and a commitment to finding marketing dollars for these target markets, will remain in place for the period of the plan.

These assumptions will be reviewed regularly by all team players. Careful monitoring of the assumptions will be a critical component of the overall evaluation of the strategic plan.

Appeals of Alberta

Alberta's major drawing cards are:

- the ***Canadian Rockies***
- ***Big Nature***—a clean and protected environment, pristine scenery, abundant wildlife, and high-quality national parks
- ***Western Hospitality***—genuinely warm and friendly hospitality for visitors

Strategic Positioning

Building on Alberta's reputation for genuine warm hospitality in a pristine setting, Alberta will be consistently presented to each major target market as follows:

Alberta provides a majestic, natural setting in which vacationers can experience renewal, rest and relaxation. The pristine landscape, the warm natural hospitality of the people and the broad range of activities and experiences provide an opportunity to recharge personal batteries—to "come alive," whatever the season. Alberta is the place to enjoy a unique, authentic experience of western hospitality.

A two-part strategy will be used:

- Create a strong and compelling image of Western Canada that will appeal to long-haul travellers; present Alberta as a distinct, compelling, "must see" component of Canada's western identity. This strong image of Alberta should also stimulate travel from regional and close-in markets to regenerate personal batteries through stimulating activities and experiences.
- Create a sense of urgency in all markets in regard to visiting Alberta; communications should emphasize the importance of visiting the province now or in the near future.

Strategic Roles and Approaches

A variety of approaches will be important in implementing this strategy:

- Alberta Tourism will take a leadership role in stimulating new business from long-haul developing markets.
- Alberta Tourism also will work cooperatively with Tourism Canada, the other western provinces, and the four gateway cities—Calgary, Edmonton, Vancouver and Victoria—to present Western Canada as the primary destination in long-haul developing markets. This effort will be aimed at increasing the overall size of Western Canada's tourism market, and

at increasing Alberta's share of that market.

- Alberta will be established as a "must see" hub and a gateway to the Canadian West.
- Alberta will generate high levels of awareness in target markets; this will help to create a desire to visit Alberta either as a sole destination or as part of a Western Canada experience that includes Alberta's unique attributes and appeals.
- Sales will be generated through close cooperation with the private sector. Objectives will be measurable so that progress can be evaluated.
- Responsibility for developing in-Alberta and regional close-in markets will rest with the private sector, through their individual and collective marketing activities.
- Alberta Tourism will support the private sector's marketing efforts in the in-Alberta and the regional close-in markets, by providing research, market intelligence, planning and business development advice, and facilitating financial partnership. This support will be provided on the basis of strategic priorities.

Strategic Thrusts

The tourism marketing goal for Alberta will be achieved through these key strategic thrusts:

- creating a strong image of Alberta
- emphasizing sales in addition to generic awareness, and creating a sense of urgency in promotional communications
- providing accessible, combination packages to increase length of stay and revenue in key destination areas
- the development of co-operative packages including attractions, tours, events, and services within and around travellers' core destinations
- spreading the tourism demand across more of the province and through more of the year.
- marketing shoulder season and off-peak travel opportunities
- encouraging in-Alberta and regional close-in markets to try under-utilized areas of Alberta
- presenting cities and resorts as safe, attractive, anchor destinations that offer a broad range of experiences
- working to increase the accessibility and affordability of flights into the province
- accelerated product development in the province's highest-demand area
- developing an organized and systematic tracking system to measure sales and monitor performance

Alberta's Tourism Marketing Goal

To increase Alberta's Annual Tourism Revenue from $2.6 Billion per Year in 1990 to $4.37 Billion per Year by December 1996To increase Alberta's Annual Tourism Revenue from $2.6 Billion per Year in 1990 to $4.37 Billion per Year by December 1996

Alberta's Tourism Marketing Objectives

1. Increase Total Annual Revenue from Long-Haul Developing Markets, from $739 million in 1990 to $1.33 billion by December 1996.

   1.1 To attract an additional 115,000 travellers from long-haul markets, and to generate $92 million in additional revenue from these trips by December 1996.

   1.2 To attract 37,000 new destination vacationers (people choosing Alberta as a location), and to generate $29.6 million in additional revenue from these visitors by December 1996.

   1.3 To attract 3,000 new adventure/outdoor visitors to Alberta, and to generate $2.4 million in additional revenue from these visitors by December 1996.

   1.4 To attract 15,000 new ski visitors to Alberta (60,000 skier-days), and to generate $12 million in additional revenue from these visitors by December 1996.

   1.5 To attract 30,000 new visitors through meetings or conferences, and to generate $24 million in additional revenue from these visitors by December 1996.

2. Increase Total Annual Revenue from the In-Alberta and Regional Close-In Markets, from $1.75 billion in 1990 to $2.92 billion by December 1996.

3. Increase Total Annual Revenue from the Long-Haul Emerging Markets, from $83 million in 1990 to $124 million by December 1996.

Long-Haul Developing Markets
Objective 1

Increase Total Revenue from Long-Haul Developing Markets, from $739 million in 1990 to $1.3 billion by December 1996.

Tactic 1

Approach Long Haul Developing Markets through a Western Canadian Marketing Partnership.

Tactic 2

Take the actions necessary to realize the growth targets of Objectives 1.1 to 1.5.

STRATEGIC ANALYSIS

Long-haul developing markets accounted for 1.6 million individuals travelling to Alberta in 1990. Of these, it is estimated that about 879 thousand, or an average of 54 per cent, involve persuadable markets. The top five geographic markets of origin include:

	Person -Trips	Persuadable to Alberta	Average # Nights
Ontario	167,400	117,600	5.9
California	314,4000	101,700	5.3
E. & W. Central	142,500	97,800	4.4
United Kingdom	123,500	79,700	6.7
Japan	102,600	71,200	4.6

Private sector statistics suggest that the Japanese market is understated in these figures.

The long-haul developing market contributed some $739 million to Alberta in 1990, accounting for almost 30% of the province's tourism revenue. It has been Alberta's most important growth market in the past decade.

Experience Desired

Different people look for different experiences when they travel. Long-haul travellers come to Alberta for a variety of experiences, depending on their market segment (as outlined below).

Who They Tend To Be

The long-haul developing market has been subdivided into five segments (further subsegments are detailed in the next five sections of this document, Objectives 1.1 through 1.5). The five segments are:

- ***Long-Haul Touring Travellers***
  (people travelling around a large area, for whom the travelling is part of the attraction)

  accounting for almost 800,000 persuadable person-trips to Alberta

- ***Destination Travellers***
  (people who stay in a city or resort each night and explore surrounding areas through day-trips)

  accounting for some 130,000 person-trips or 13 per cent of persuadable long-haul travel

Objective 1

Increase Total Revenue from Long-Haul Developing Markets, from $739 million in 1990 to $1.3 billion by December 1996.

- ***Meetings Visitors***

  accounting for some 120,000 person-trips or 12 per cent of the long-haul market

- ***Skiers***

  approximately 20,000 persuadable trips, comprising 2 per cent of long-haul travellers

- ***Adventure Travellers***

  a small market at about 10,000 persuadable long-haul travellers, it accounts for 1 per cent of the long-haul market.

Appeals of Alberta

- the Canadian Rockies
- Big Nature—clean and protected environment, pristine scenery, abundant wildlife, and high-quality national parks
- Western Hospitality—warm, friendly, welcoming people

Resistances to Alberta

- awareness—image and awareness of Alberta are low in most markets
- differentiation—our major products (mountains, scenery and nature) are not sufficiently differentiated from those of our competitors
- lack of urgency—the Canadian Rockies are on the "someday" list of many potential visitors

Competition

Alberta faces strong competition in all long-haul markets.

Product Development Implications

Implications are addressed for each objective in the following sections.

Long-Haul Touring Markets
Objective 1.1

To generate an Additional 115,000 person trips and an additional $92 Million in Revenue from New Long Haul Touring Travellers to Alberta by December 1996

Positioning Strategy

To gain a presence within the target markets, it is important to:

- see that positioning efforts across province are consistent
- communicate a sense of urgency about seeing the province soon
- provide enough detailed information to satisfy potential visitors' concerns, and to make the image come alive.

Priority Target Markets

- ***Independents***

  USA, Canada (focus on Ontario)

- ***Fly-then-Drive***

  Germany, United Kingdom, Ontario

- ***Motorcoach***

  USA, Japan

Marketing Tactics

Independents

1. Increase awareness in US target markets through regional/national print media, association media and RV-owner groups. Focus on experienced long-haul touring markets.
2. Focus literature on the Alberta experience in and around main destination areas.
3. Develop short-duration packages, containing a variety of services or attractions to choose from, in and around major destinations.
4. Develop specific "themed" driving tours.
5. Provide detailed information on all aspects of the trip.

Fly-Drive

1. Develop and market specific tour packages, focusing on the main destination areas.
2. Develop a cafeteria approach to packaging, where short-duration options (soft adventure, heritage, etc.) are offered in the fly-drive package. The cafeteria approach allows visitors

Objective 1.1
To generate an Additional 115,000 person trips and an additional $92 Million in Revenue from New Long Haul Touring Travellers to Alberta by December 1996

to choose from a variety of attractions, events, or services, but to pay a single, package price.

3. Provide detailed trip planning information, campground information, guides to services, and so on.

Motorcoach

1. Provide high-quality, responsive service to all motorcoach operators.
2. Develop and provide detailed information for itinerary planning.
3. Promote awareness through publicity in major magazines, print advertising in appropriate vehicles, direct selling, and the appropriate trade shows.

STRATEGIC ANALYSIS

Long-haul touring visitors are usually first-time visitors to Alberta who are here to see the Canadian Rockies. Three subsegments, listed in order of importance, are:

- ***independent travel by personal car or RV*** to and through Alberta from the visitor's place of origin (the preferred mode of many Americans)
- ***independent travel on a fly-drive basis,*** which involves air transportation to a nearby gateway and then renting a car or RV for touring at the destination (the preferred mode of Germans and increasingly of Britons and of East Coast Americans)
- ***a package tour using motorcoach*** or some other form of public carrier (the preferred mode for Japanese, older Americans and some first-time visitors from Europe)

Experience Desired

- the trip is part of the fun
- a value on safety, comfort, company
- seeing the Canadian West, not just Alberta

Who They Tend To Be

- late middle years (45-65)
- $40,000 to $60,000 income
- this is not a geographically based market
- independents come from throughout USA; fly/drive and package tour travellers are more likely from Europe and Japan

Appeals of Alberta

- Canadian Rockies, natural features, wildlife, environment
- friendly people
- foreign country, English-speaking

Resistances to Alberta

- from US markets: cold climate, distance, low awareness of services
- from European markets: distance between attractions, lack of low-priced accommodation and food
- from Japanese markets: lack of flight accessibility, language difference, lack of retail outlets

Competition

Primary competitors are North American Rocky Mountain venues, many of whom are making a great collective marketing effort.

Product Development Implications

1. Develop RV facilities and services in key destination areas.
2. Encourage full-service RV rental operators.
3. Encourage accommodation development in key destinations.
4. Accelerate Kananaskis Country development.

Roles

1. PMO leads in coordinating effort with other partners.
2. Western Canadian marketing consortium work with NTO and western partners.
3. DMOs coordinate regional packaging, partnerships and consortia.
4. PSS's work with and through DMOs.

Destination Markets
Objective 1.2

To Generate an Additional 37,000 Visitors and an Additional $29.6 Million in Revenue from New Destination Vacationers travelling to Alberta by December 1996

Objective 1.2
To Generate an Additional 37,000 Visitors and an Additional $29.6 Million in Revenue from New Destination Vacationers travelling to Alberta by December 1996

Positioning Strategy

Alberta and the Canadian Rockies will be presented as a unique environment in which a person can reach back to what is "real" in themselves.

Priority Target Markets

The moderately affluent segment is the main target for the Canadian Rocky Mountain experience in the foreseeable future. These travellers are defined more by the trip experience than by geography.

- ***USA:*** emphasize the Canadian Rockies as a very different place to visit and a good place to experience different cultures and ways of life
- ***Japan:*** focus on the uncrowded, safe, clean, and action-oriented aspects of Alberta
- ***Germany:*** emphasize outdoor opportunities, national parks and forests, outstanding scenery, and wildlife in a natural setting

Marketing Tactics

1. Work with Western Canadian marketing consortium partners to highlight the collective destination, while differentiating Alberta from the rest of the West.
2. Develop and maintain strong relationships with key tour wholesalers and operators in target market areas.
3. Develop cafeteria packaging of services and attractions in and around main destinations; distribute them through wholesalers, operators and other trade channels.

STRATEGIC ANALYSIS

The destination market can be subdivided into other segments:

- sophisticated vacationers who prefer high quality accommodations in a resort or urban setting; the setting should also offer a wide variety of things to see and do that have an element of status and prestige about them
- moderately affluent couples who are looking for a restful vacation in a natural setting.

Experience Desired

- sophisticated vacationers desire destinations that can be "acquired" and have "bragging rights"
- moderately affluent couples seek to relax, experience, and regenerate in a clean, secure, comfortable setting.

Who They Tend to Be

- sophisticated travellers are older (50-65 years), wealthier ($60,000+), "empty-nesters" who have time to travel
- the moderately affluent are younger (35+), less affluent ($40,000+), travelling as adult couples

Appeals of Alberta

- the Canadian Rockies, Big Nature and the image of Banff

Resistances to Alberta

- the gently aging image of Banff
- no sense of urgency
- not exotic enough for sophisticates

Competition

1. Competition is very strong from mountain resort and urban competitors, worldwide.
2. Consortium marketing programs are common, and promotion approaches have been implemented for increasingly specific market segments.

Product Development Implications

1. Encourage development of the proposed Calgary-Banff resort product.
2. Encourage expansion and development of new attractions in destination resorts, and in and near gateway cities.

Roles

1. Destination marketing should occur through the Western Canadian marketing consortium.
2. DMO's should coordinate their PSS partners to highlight individual destinations.
3. Resort consortia should be encouraged to lead marketing in resort destinations.
4. The PMO should provide market intelligence, research evaluation, and partnership in the Western Canadian marketing consortium.
5. PSS's should develop packages and products, and act as partners in marketing destinations.

Adventure/Outdoor Markets
Objective 1.3

To generate an Additional 3,000 visitors and an Additional $2.4 Million in Revenue from Adventure/Outdoor Markets travelling to Alberta by December 1996

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Positioning Strategy

Working within the approach taken by the Western Canadian marketing consortium, the Canadian adventure product/themes will be offered as accessible, affordable, unspoiled wilderness and a "real" Canadian experience. The human element—the colourful personality of the Canadian guide—will be used to accomplish the theme, reduce anxiety about safety in the wilderness, and set the hospitality image.

Priority Target Markets

- ***Ontario and Eastern Canada***

  expert adventurers, reached through clubs, associations and speciality media

  casual adventurers, choosing among modular packages of attractions and services

- ***United Kingdom***

  softer adventure experiences aimed at the casual adventurer

- ***West Germany***

  emphasize a combination of culture and nature

- **France**

  outdoor travellers, and culture and nature groups

- ***United States***

  California, Texas, Arizona, Washington (with an emphasis on urban areas)

  Mid West (Minneapolis, Chicago, Detroit)

  Eastern Seaboard

Marketing Tactics

1. Develop a Western Canadian Adventure Travel Guide for distribution to independent travellers, wholesalers, and retail agents in long-haul markets.
2. Develop modular attraction/service packages as well as information on specific suppliers, for use within this guide or separately at destinations.
3. Promote marketing partnerships with leading adventure wholesalers and retailers in the target markets. Provide audio/visual material in the language of the target market.
4. Develop and/or maintain a strong working relationship between long-haul operators and the ground operators who will be meeting and escorting long-haul travellers.

STRATEGIC ANALYSIS

While the long-haul market for adventure travel to Alberta is still small (10,000 overnight guests), interest in adventure travel is growing worldwide. The majority of Alberta operators, however, currently cater to regional and close-in markets.

There are three major identifiable sub-markets of the adventure travel market:

- ***Casual adventure travellers*** are the entry-level adventurers experimenting with new and challenging outdoor activities; they take short, one- or two-day trips in order to get a "taste of adventure." This market offers Alberta adventure activity suppliers with the greatest potential in the short term.
- ***Committed upscale adventure travellers*** are the trend setters; they travel to destinations they can brag about, in order to participate in activities that are new and unique, or are popular with certain groups.
- ***Expert adventure travellers*** are more interested in mastering sports-related skills or knowledge, and in meeting their own needs for challenge, personal growth, or stress release.

Experience Desired

- casual adventurers desire short, modular, low-risk adventure experiences where they can "taste" the activity
- committed upscale adventurers desire "the best" in "bragable" activities, and high-quality accommodation and services
- expert adventurers seek basic, clean services at reasonable costs.

Who They Tend To Be

- casual adventurers have profiles the same as those of the touring and destination markets
- committed upscale adventurers are younger (30-50 years), professionals from cosmopolitan cities; they are both singles and adult couples, and have higher income ($50,000+)
- expert adventurers are younger (25-30 years) with a lower income ($30,000 to $50,000); they are single, professional, and have limited time.

Appeals of Alberta

- the Canadian Rockies have a strong, positive image in Europe and more broad market appeal
- for the perceived markets, Alberta offers a wide range of adventurous activities

Resistances to Alberta

- Alberta's appeal to the committed upscale adventure market in the US is currently weak because it is not considered to be exotic enough
- time, distance and cost are resistances for the casual and expert adventure markets .

Competition

1. Alaska and the American Rocky Mountains are major competitors for the upscale committed market, and Alberta does not have the "bragability" required for this market.
2. Competition in the other markets is stiff, with a great variety of benefits offered at varying prices in competitive destinations.
3. Few competitors offer fully integrated, modular packaging of adventure experiences.

Product Development Implications

Facilities need to be developed, of the quality suited to long-haul markets. In order to compete effectively, it will be important to expand the range of tourism facilities and experiences available.

Ski Markets
Objective 1.4

To generate an Additional 15,000 Skiers (or 60,000 Skier Days) and an Additional $12 Million in Revenue from New Ski Visitors to Alberta by December 1996

Positioning Strategy

Alberta's Canadian Rockies will be positioned as a world-class, multi-mountain complex, with full service in a highly protected natural environment. It is a non-congested, friendly destination where "real" skiers who value quality skiing come to regenerate.

Priority Target Markets

- ***United States***

  California, Texas, Midwest

  Central Canada

  Southern Ontario, centred on Toronto

  Quebec, centred on Montreal

- ***Japan***

  through wholesalers and operator networks

- ***United Kingdom***

  small group packages

- ***Germany***

  small group packages

Marketing Tactics

1. Reinforce the consortium marketing effort. Bring all major mountains into the consortium.
2. Form alliances and develop cooperative marketing partnerships with major airlines, tourism bureaus and complementary marketing consortia.
3. Develop and promote an "all-mountain" pass as a key element in ski packages.
4. Develop strong relations with wholesalers and operators in key market areas.
5. Develop and/or promote major events, focusing specific packaging around them.
6. Develop cafeteria-style packaging with full "how to" information for target markets.

STRATEGIC ANALYSIS

Alberta's major mountains host approximately 40,000 skiers (160,000 skier days) per year from long-haul markets. While the ski slopes and associated infrastructure are now world-class, there is still a need for more luxury-class resorts and amenities close to the ski slopes.

Objective 1.4

To generate an Additional 15,000 Skiers (or 60,000 Skier Days) and an Additional $12 Million in Revenue from New Ski Visitors to Alberta by December 1996

Ski Markets Objective 1.4

Growth can only come through capturing a larger share of the ski market. Alberta can appeal to two types of skiers:

- ***avid skiers***, who ski frequently, look for real challenge and enjoy nightlife
- ***mainstream skiers***, who have intermediate skills and tend to ski with family and friends

Experience Desired

Both ski markets seek:

- assured snow conditions
- good facilities
- reasonable weather
- challenge
- a clean environment
- opportunity to socialize

Appeals of Alberta

- the Canadian Rockies image
- great snow, assurance of powder, perception of challenge
- spectacular scenery, clean big nature environment
- good services

Resistances to Alberta

- somewhat faded image, lack of glitz
- lack of on-hill accommodation
- perception of cold weather in some markets

Competition

Competitors are aggressively marketing four-season destination products with skiing as the winter anchor. Consortium marketing approaches and detailed appeals to particular market segments are common.

Product Development Implication

Encourage the development of tourism attractions, tours, services and packages to complement the core ski product.

Roles

1. The ski marketing consortium will lead all long-haul development market efforts; other partners will support the effort.
2. PMO provides market intelligence, evaluation research, technical and financial partnership in positioning/packaging, and trade show support.

Meetings Markets
Objective 1.5

To generate an Additional 30,000 Visitors and an Additional $24 Million in Revenue from New Meetings Visitors to Alberta by December 1996

Positioning Strategy

The perception to create in the Associations Meetings market is of Alberta as a clean, secure, accessible, value-for-money venue with a friendly but foreign culture, great hospitality, and a Canadian Rockies setting. The Calgary-Banff area will be similarly positioned in the European and US corporate/incentive travel markets by focusing on the same features.

Priority Target Markets

- ***Association*** (conferences, professional meetings)

  Washington, D.C., Chicago, Toronto, Ottawa and Europe

- ***Corporate/Incentive*** (meetings of corporate organizations/travel to meetings as a business incentive or reward for strong production)

  New York, Chicago, Los Angeles, Minneapolis, Toronto and Europe

Marketing Tactics

1. All principal players should be involved in identifying potential organizations to attract.
2. Tourism Canada and Canadian consulate sources should be used extensively and effectively.
3. The DMO will lead PSS members in developing a coordinated effort for identification of leads, approach, presentation, and closure in Canada. In the U.S. and Europe, the PMO will lead.
4. Key trade shows, conferences, meetings, and individual calls will be coordinated and implemented through the PMO in cooperation with the DMOs and PSS.
5. Coordinated lead identification will be followed with direct personal selling.
6. All tactics in the long-haul markets will be coordinated among the team players.
7. PMO will coordinate a tracking system to record results.

Objective 1.5
To generate an Additional 30,000 Visitors and an Additional $24 Million in Revenue from New Meetings Visitors to Alberta by December 1996

STRATEGIC ANALYSIS

According to a recent study of meetings markets commissioned by Alberta Tourism, best estimates for the major sub-markets of the meetings industry include:

- ***corporate meetings and incentive travel***

  a market worth $55 million for 1,600 meetings with 255,000 attendees in 1990

- ***association meetings***

  3,800 Alberta events with 609,000 delegates, for a value of $210 million in 1990

- ***trade shows***

  60 trade shows in 1990, with 142,000 attendees and a yield of $46 million

- ***consumer shows***

  100 consumer shows in Alberta in 1990, with 928,000 attendees generating $81 million.

The most important long-haul developing markets for Alberta, in order of priority, are association meetings, incentive travel, and corporate meetings. Trade shows and consumer shows are usually local events rather than long haul tourism generators.

Experience Desired

- All segments require service quality, dining, and accommodation.
- The corporate meetings market requires meeting rooms that are properly set up and equipped, value for money, and recreation facilities.
- The incentive travel market is a particularly high-spending market that requires first-class facilities in all respects and excellence in all services, destination image, and recreation opportunities.
- The association market requires good facilities, meeting rooms that are properly set up and equipped, easy access, and clean and secure surroundings.

Who They Tend To Be

- It is estimated that approximately 89 per cent of corporate meeting attendees are from Alberta, while 5 per cent are from elsewhere in Canada and 6 per cent, or 15,300 people, are from outside Canada.
- The association meetings market is more dispersed: approximately 13 per cent (79,170 visitors) travel from outside Canada, primarily from the USA.

Appeals of Alberta

- quality of facilities
- competitive resort destinations (particularly for incentive groups)
- cleanliness, safety, security
- friendliness
- high service standards
- professional approach to meeting planners

Resistances to Alberta

- lack of awareness
- lack of incentive travel packages
- lack of sufficient and accessible flights
- facilities that are limited in capacity
- lack of cosmopolitan image

Competition

1. Alberta faces strong competition from major cities and resorts (incentive destinations) throughout North America. In many cases Albertans face a price disadvantage in airfare.
2. Competitors are promoting meetings destinations collectively, aggressively, and continually.

Product Development Implications

1. Calgary requires improved capacity.
2. Calgary-Banff incentive packages can be refined and better coordinated to more effectively reach the market.

Roles

1. The DMO's should coordinate all sales efforts, support bids, and attend enhancement programs.
2. The PMO should support sales efforts with client identification, formal research, compilation and dissemination of market trends, and assistance with the coordination of site visits.
3. Tourism Canada and the Canadian Consulates should be used for identifying clients, research support, and screening leads in international target markets.

In-Alberta & Regional Close-In Markets Objective 2

To increase the Total Annual Revenue from the In-Alberta and Regional Close-In Markets from $1.75 Billion per Year in 1990 to $2.92 Billion per Year by December 1996

Objective 2
To increase the Total Annual Revenue from the In-Alberta and Regional Close-In Markets from $1.75 Billion per Year in 1990 to $2.92 Billion per Year by December 1996

Positioning Strategy

Each DMO is responsible for its own image development in these markets. However, the overall positioning of Alberta should guide the development of specific destination area themes.

Priority Target Markets

- ***Touring Markets***

  focusing on families, RV owners, fly-and-drive markets, and motorcoach tour markets

- ***Short Getaway Markets***

  focusing on urban-based adult couples and families with children; emphasis should be on urban experience (shopping, theatre) and on resort experience (relaxation/regeneration).

- ***Visiting Friends and Relatives Markets***

  generating repeat visits through events, packaging and discounting

- ***Meeting Markets***

  focusing on regional association meetings and corporate meetings

- ***Geographic target markets***

  British Columbia, Saskatchewan, Yukon and Northwest Territories, Montana, Washington and Oregon—with a focus on urban residents

Marketing Tactics

1. Develop flexible, cafeteria-style packages for major destinations and experiences. Use co-operative or consortium approaches within and across marketing areas.
2. Develop a variety of "getaway" vacation packages for major destinations, focused on the weekend getaway markets. Develop partnerships with retail operations to enhance packages.
3. Prepare and package all information within a province-wide thematic "envelope," but provide specific, detailed information on how to get there and what to do.
4. Develop and promote specific events and specific attractions that offer key Alberta themes—Big Nature, warm hospitality, and heritage.
5. Promote ski markets in the same way as for long-haul ski markets.

6. Promote the meetings markets through DMO product offerings.

7. Develop an Adventure Guide, using Alberta operator information from the Western Canadian Guide.

STRATEGIC ANALYSIS

The marketing strategy and plan for domestic and close-in markets will be determined and driven by the fourteen Alberta tourism zones and their private sector partners. Those target markets are already aware of Alberta and are more in the "purchase and experience" end of the tourism marketing cycle. What these travellers need is to know details about the product, its price, when and how to purchase it, and how to get there.

The in-Alberta travel market in 1990 involved some 9.7 million individuals spending at least one night in the province, generating some $1.4 billion—50 per cent of the province's tourism revenue that year.

Overall 38 per cent of Albertans' trips within Alberta were for the purpose of visiting friends and relatives. Albertans travelling for pleasure for more than one night tend to:

- visit friends and relatives 64%
- shop 32%
- see the sights 22%

Thus friends and relatives remain a very important activity for Albertans travelling within the province. This segment is part of the persuadable portion of both the in-province and regional markets, as they may be persuaded to stay longer and to spend more. Their visits can be influenced by marketing on the same basis as for other target groups:

- specific events
- specific attractions
- the "short-getaway" packages
- specific activities

The regional close-in markets, accounting for 14.4 per cent of travel (1.9 million person-trips) to Alberta, consist of short-haul travellers from British Columbia, Saskatchewan, Montana, Washington/Oregon and the Yukon and Northwest Territories. The persuadable portion of this market amounts to some 626,400 travellers. Regional markets are aware of Alberta, and will respond to the same marketing tactics as are developed for in-Alberta markets.

Experience Desired

In-Alberta and regional close-in markets want to experience interesting destinations, events and attractions in a safe, relaxing setting. The "foreign" flavour of a nearby culture offers additional incentive for the nearby US markets.

Who They Tend To Be

- Markets vary widely and include families with children, adult couples, adult singles, and the mature market.
- The markets are occasion-based markets, travelling for specific attractions, events or experiences.

In-Alberta & Regional Close-In Markets Objective 2

Appeals of Alberta

The full variety of Alberta tourism products offers opportunity for these markets, as they are travelling in response to a specific occasion-based "trigger."

Resistances to Alberta

Price and distance may be resistances for some USA markets.

Competition

1. Competition abounds within and near the states and provinces close to Alberta.
2. Alberta's private sector suppliers (PSS) must compete with organized, consortium-based marketing entities offering similar facilities and experiences.

Product Development Implication

No specific new product development is needed for these markets. However, product improvement throughout the province would be desirable.

Roles

1. With leadership from the DMOs, PSS players should work together to address these markets.
2. PSS consortia around particular products and services should be organized by private players and DMOs.
3. The PMO will provide market intelligence, evaluation and promotion advice, and will help team players acquire base funding through available channels.
4. The PMO will assist in developing a process for DMOs and PSS to develop and implement a coordinated in-province and regional strategy.

Long-Haul Emerging Markets
Objective 3

To increase Total Annual Revenue from the Long Haul Emerging Markets from $83 Million per Year in 1990 to $124 Million per Year by December 1996.

Positioning Strategy

The overall image of Alberta will be adapted to highlight the experiences desired by each major target market.

Priority Target Markets

- Priorities will be set by PSS consortia or the Western Canadian marketing consortium, on an opportunities basis
- Geographic priority markets are Switzerland (as part of German-speaking Europe), the Netherlands, France, Taiwan, and Korea.

Marketing Tactics

1. Strong relationships with members of the travel trade will be developed well in advance of developing specific marketing campaigns.
2. When appropriate, private-sector packaging based in cities that have air connections will be developed in cooperation with other parties.

STRATEGIC ANALYSIS

Long-haul emerging markets offer opportunities for longer term development. Where marketing funds must be carefully and collectively allocated, a limited effort based on specific opportunities is appropriate.

Experience Desired

These markets have little awareness of the Alberta experience.

Appeals of Alberta

- Big Nature, open spaces, pristine environment
- comfort
- security

Resistances to Alberta

- haul
- price
- low awareness

Many of these potential travellers desire to see the USA first, and it can be difficult to sell Canada unless the trip can be combined with a visit to the US.

Objective 3

To increase Total Annual Revenue from the Long Haul Emerging Markets from $83 Million per Year in 1990 to $124 Million per Year by December 1996.

Long-Haul Emerging Markets Objective 3

Competition

1. The USA is the major competitor for those visitors who would consider a major long-haul trip.
2. Australia/New Zealand is a major competitor for the Canadian experience in Pacific Asian markets.

Product Development Implication

No product implications are implied in the foreseeable future.

Roles

1. PSS cooperatives will provide leadership in these markets on an opportunities basis.
2. Where warranted, PMO and DMO's will provide partnership funds on an opportunities basis.

Evaluation

Evaluation will include a measurement of the achievement of goals and the effectiveness of the tactics used to achieve those goals. An effective evaluation will also provide clean guidelines as to how marketing efforts can be improved in the future.

Goals to be measured:

- increases in ***numbers*** of visitors and visitor person/nights
- increases in person/trip ***expenditures***
- ***effectiveness*** of the positioning strategy advertising and promotion in creating visitor days and dollars.

Achievement of goals will be evaluated for each segment, defined in operational terms:

- ***In-Alberta and Regional***

  by geographic origin

- ***Long Haul Developing***

  by geographic origin

  by the primary reason for their trip

- ***Long Haul Emerging***

  by geographic origin

  by primary reason for the trip

Visitors will be classified as new visitors or repeat visitors.

The specific methodology or tactics will be developed by Alberta Tourism, in cooperation with the DMOs and PSS.

Evaluation

Numbers

Expenditures

Effectiveness

Implementation

The Framework and Process for Cooperation

Earlier work, entitled T*ourism Marketing Planning Framework and Process for Alberta Tourism*, contains the overall framework for Alberta's tourism marketing team. It outlines an annual planning process within which the partners in tourism can work together to:

- evaluate market performance
- evaluate positioning strategies, tactics and marketing activities
- adjust the strategies to meet the targets
- co-ordinate marketing activities.

The key elements in the planning process are as follows:

- a long-term planning component that defines the overall "vision" within which provincial tourism development can take place
- a provincial/regional information system
- an organizational philosophy and structure that involves representatives from all sectors, regions and levels as *active* and *equal* partners
- a limited number of yearly meetings that bring together government, DMOs and industry members at the provincial level
- a series of regional meetings
- a series of product/experience-based meetings
- a series of informational seminars delivered on a regional basis
- an annual strategic planning component that reviews trends and forecasts the outlook for the industry, develops/revises the strategic plan, and identifies the major program initiatives to be established and/or modified for the coming year
- a series of tactical sessions in which information is exchanged and programs are coordinated
- a series of seminars on the characteristics, needs and opportunities associated with existing and emerging markets
- a series of seminars concerning competitive destinations
- a series of "special topic" seminars on subjects/techniques of universal and/or emerging interests (packaging, pricing, quality of service, productivity management, image development, staff recruitment/ training, computers, and so on).

The framework and process that follow from these key elements is outlined below:

The Alberta Marketing Planning Framework and Process

JANUARY (3rd Week): Alberta's Marketing Strategy Conference

Leader: Alberta Tourism

Who?: PMOs, DMOs, PSSs, Consortia

Activities:

- Review prior year's performance
- Review assumptions, hypotheses
- Agree on further research needs
- Identify strategic thrusts, priorities, roles
- Review budgets and make final adjustments for upcoming fiscal year

APRIL (1st Week): Alberta Marketing Workshops

Leader: TIAALTA or DMOs

Who?: DMOs, PSSs, Consortia

Activities:

- Target market seminars
- Translation of market research
- "How To" sessions - packaging, co-ops, etc.
- Present advertising creative
- Provide/sell direct mail lists

JUNE (2nd Week): Alberta's Marketing Strategy, 199X

Leader: Alberta Tourism

Who?: All Players and Interested Albertans

Activities:

- Launch publication
- Direct mail to all partners
- Presentations at major DMOs

SEPTEMBER (3rd Week): Alberta's Marketing Planning Conference

Leader: Alberta Tourism

Who?: PMOs, DMOs, PSSs, Consortia

Activities:

- Review emerging summer results
- Confirm/adjust strategic thrusts
- Compare, refine tactics
- Implementation

NOVEMBER (Last Week): Alberta Tourism Marketing Activities Calendar

Leader: Alberta Tourism

Who?: All Players and Interested Albertans

Activities:

- Launch the draft Marketing Activity Calendar

JANUARY (3rd Week): Alberta's Marketing Strategy Conference

Leader: Alberta Tourism

Who?: PMOs, DMOs, PSSs, Consortia

Activities:

- Review budget changes
- Finalize tactics for launch
- Review prior year's performance
- Review assumptions/hypotheses
- Agree on further research needs
- Identify strategic thrusts for next year

APRIL (1st Week): Marketing Plan Launch - Implementation Begins

Leader: Alberta Tourism

Who?: All Partners

Activities:

- Launch campaign for that fiscal year
- Begin monitoring program

It should be clear that this framework and process is for Alberta's entire tourism industry, not simply for the Department of Tourism. The industry partners, the destination marketing organizations, and the private sector suppliers will participate as researchers, workshop and seminar hosts, and as financial participants in the major stages of the process.

The major steps involved in getting the annual marketing cycle off the ground are as follows:

- Alberta should request a "summit" conference of key stakeholders in a Western Canadian marketing consortium, with an agenda to begin the marketing strategy and implementation process.
- Major DMOs should examine the packages they now offer to group and to independent markets; they should act with the PMO to coordinate these packages and encourage the development of modular and cafeteria-style packages.
- Alberta Tourism should proceed with the appropriate major elements of the Literature Strategy in consultation with industry partners; this would provide flexible information products to help potential visitors obtain complete, detailed and current information about the prospective Alberta visit.
- Alberta Tourism should develop its draft marketing activities for 1992-1993 and make any adjustments that are feasible for the 1991 effort.
- Major destination marketing organizations should coordinate meetings between private sector partners and Alberta Tourism marketing people, for the purpose of adjusting and coordinating marketing activities.
- Major Destination Marketing Organizations should work with Alberta Tourism to implement the evaluation framework (to follow), in cooperation with local industry.

- The partnership developed through the annual marketing planning process should continue to set and adjust priorities for Alberta's tourism marketing team.
- Alberta Tourism should coordinate the major strategy conference to be held in January 1992.

Each of the partners' annual marketing plans may look like this:

Overall Goal for Tourism in Alberta

Situation Analysis

- Summary of current information that helps establish marketing objectives and priorities.
- Baseline against which future marketing goals can be measured.

Specific Market Segments

- Based on trip purpose or experience desired.

Specific Objectives for Each Market Segment

Strategies

- A description of how objectives will be achieved.

Marketing Activities

- Specific actions to undertake to meet marketing objectives.

Monitoring

- Points of measurement against the objectives.

Evaluation

- Must have information from monitoring in order to evaluate.
- Becomes part of the situation analysis.

Background Reports

The Report - *Strategic Marketing Plan for Tourism in Alberta 1991-1996* — will be circulated widely to the people of Alberta.